Individual Development Plan Instructions

Welcome to Your IDP Site
(https://mis.doe.gov/ess)

Introduction

This function within Employee Self Service (ESS) affords you the opportunity to create and revise your IDP on line. You will find links to various resources including the DOE Training Catalog. When you have defined your goals and the activities to achieve those goals, you can print a hard copy and/or notify your supervisor that your IDP is ready for review on line. This process in no way substitutes for the personal communication and discussions between you and your supervisor prior to or during the development of the plan.

Why an IDP? Individual Development Plans are used to plan developmental experiences (course work, special projects, on-the-job training, details etc.) which may change from year to year as the mission of the organization evolves. Its primary purpose is to ensure that there is an alignment between the skills the organization needs for success and the competencies that an employee possesses and/or needs to support organizational goals and priorities.

The benefits of an IDP are many:

1. Developing a plan of action contributes to success.
2. Chance for supervisors and employees to work out plans for achieving goals that relate to employee and organizational needs.
3. A tool for supervisors and employees to communicate and reach agreement on goals and developmental needs. Supervisors may not always know the interests of employees.
4. An opportunity to acquire information on where skills fit into an organization's current needs and future needs; to obtain a better understanding of organizational career opportunities.
5. Employees gain another perspective on how their skills, abilities, strengths, and developmental needs are viewed.

The following are the steps in the process you will follow to complete your IDP:

Step 1: Confirm/Set your IDP Profile
1. If you have already set your profile, go to Step 2, Process your IDP.
2. If you haven't set your profile or need to modify it, click on "IDP".
3. Select "Set Profile" from the list of options available under the IDP drop-down box.
   - Confirm your selection if you are updating your IDP.
   - If you need to add or change your selection, click on the drop down box for "Select Manager". This list will contain the names of all employees in your first-tier organization (e.g., EH).
   - Select your supervisor's name. An advanced search is available if you do not see the correct name.
   - Click in the box next to the CHRIS DOE-wide catalog from which you may wish to select courses.
   - Click on the Save button. Your choices will remain until you choose to change them.

Step 2: Process your IDP
If you previously created/updated your IDP through ESS, click on "Update current IDP" to review your current IDP. If you are starting your first IDP through ESS, or are generating a new one for the new IDP cycle, click on "Create new IDP". You will be presented with two options:

> **-Option 1:** Create a new blank IDP or
> **-Option 2**: Rollover your current IDP.

Option 1 will create a new IDP, clearing out all old goals and activities. Option 2 will rollover any unmet goals and activities to your new IDP, to eliminate extra typing.

Step 3: Establish goals
You will have the opportunity to refine or newly establish 3 short range and 3 long-range goals. Short range means 1 to 2 years and long range is 3 or more years.

- Click on "Modify" to begin the process.
- Enter/Modify a brief description of your goal in the text box and hit save. (Example of a short-range goal is "Improve communication skills). If this is a new entry, once you hit save, a goal definition link will appear in blue.
- Continue to define as many goals as necessary (there is no requirement to establish all six goals).

Step 4: Add activities to each goal
Click on the goal definition (i.e., Improve communication skills) on the Goal Summary page to begin establishing the developmental activities you wish to pursue to meet the goals. These may include a training course from the DOE catalog or a non-catalog activity such as classroom training offered by a local college or other vendor, a conference, a rotational assignment, or on the job training.

- If you wish to search for a training course sponsored or owned by DOE, click on "Add new activity - in catalog"

    1. Click on the category name which is most likely to contain the course you are looking for and hit "Next".
    2. You will now see a listing of the courses in that category contained in the catalogs you chose when setting up your profile.
    3. To learn more about a course, click on the course title.
    4. Select a course, if appropriate, and click save.

If you wish to enter a different type of activity, click on "Add new activity - not in catalog." FOR BOTH, YOU WILL NEED TO COMPLETE THE INFORMATION REQUESTED. The following information will assist you in that process:

1. Activity Type: For a catalog selection this will already be filled but you must make a selection for the non-catalog activity from the drop-down menu.
2. Training reason is important so that your supervisor and training manager can establish organizational training priorities:
   - Compliance - training required by law or regulation
   - Directed by Management - training prescribed by a DOE official such as supervisory training or the EEO/Diversity Standdown
   - Development - activities needed to develop or enhance new knowledge, skills or abilities
   - Job Related - training specific to your work such as a Federal budget process course or on-the-job training
   - Transition - training provided to employees at closure sites to prepare them to perform different work
3. Describe Activity: If a non-DOE course, include course number/title, vendor contact information, description.
4. Start/End Dates (optional): Classes may or may not have been scheduled yet for the course in which you are interested. If you can't find a specific course session available, enter the approximate dates when you would like to start such a course.
5. Complete the remaining information as best you can. If you can, provide cost estimates that will help in organizational planning for training.
6. Once you have completed the information on a particular activity, you have several options. You can:
   a. Save/set target dates (if you choose this, move to instruction Step 5);
   b. Save/go back to the goal summary (to add activities for different goals) or
   c. Save/go back to activity summary for this goal. You can close out completed activities here by selecting "Not Completed" next to the activity. A dialog box will appear at the top left corner of your screen. Enter the completion date for this activity (MM/DD/YYYY). Click Submit and close window. The date you just entered will appear where the "Not Completed" was.

Step 5: Set Target dates
When you have established goals and activities, you have the opportunity to indicate whether you plan to complete the activity in the current IDP year or a future year.

- Click on the appropriate button for each activity and then hit "Save/Set Preference Order".

Step 6: Set preferences
On this screen you can indicate the order in which you prefer to complete the activities. This is especially important if your organizational training budget cannot support all requests. The Employee Preference Order field will be grayed out when the training reason is Compliance or Directed by Management.

Number your preferences sequentially across all goals, not within each goal, beginning with 1 for your first (most important) choice. Your supervisor will have the opportunity to reorder preferences in the Supervisor Preference Order fields but will not be able to change what you entered.   Now you can choose to Save/View IDP or Save/Back to Goal Summary.

Step 7: View complete IDP
Your IDP will appear when you click the Save/View IDP button. (You can also do this by clicking on "View Current IDP" on the menu.) Click "Request Manager Review" or "Back to Goal Summary" if you need to further edit your IDP.

Step 8: Request Manager Review
When you click on the Request Manager Review button at the bottom of the view IDP screen, a page will come up with your manager's name and e-mail address. It will ask if you want to send your manager an e-mail. Select "Yes" or "No". If you select "Yes", the e-mail will inform the supervisor that you have completed the IDP and it is ready for review. If you select No, the IDP is already saved, and you will be redirected to the IDP Home Page.

NOTE: There may be circumstances when an employee declines to complete an IDP. By clicking on that menu item, the employee will be able to complete on-line the justification for not establishing an IDP. Supervisor will be notified that a justification has been submitted for review on line.

Step 9: Discuss and modify as needed.
Signature on a hard copy is optional.

Step 10: Supervisory Review
Supervisors can view the employee's IDP and the Set Target page. The supervisor will enter his/her activity preferences in the Supervisor Preference Order fields.

The supervisor then reviews and signs the IDP. An e-mail automatically goes to the employee indicating that the IDP has been reviewed and signed or requesting that the employee set-up a meeting to discuss the IDP.